

Learning and Skills Scrutiny Committee

Meeting Venue
By Zoom

Meeting Date
Friday, 17 November 2023

Meeting Time
2.00 pm

For further information please contact

**Katharine Flanagan-Jones,
Democratic and Scrutiny Support
Officer**

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County Hall
Llandrindod Wells
Powys
LD1 5LG
10/11/2023

Mae croeso i chi siarad yn Gymraeg neu yn Saesneg yn y cyfarfod. Rhowch wybod pa iaith rydych am ei defnyddio erbyn hanner dydd, ddau ddiwrnod gwaith cyn y cyfarfod.

The use of Welsh by participants is welcomed. If you wish to use Welsh please inform us by noon, two working days before the meeting

AGENDA

1.	APOLOGIES
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To receive apologies for absence.

2.	DISCLOSURES OF INTEREST
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To receive any disclosures of interest by Members relating to items to be considered at the meeting.

3.	DECLARATIONS OF PARTY WHIP
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To receive disclosures of prohibited party whips which a Member has been given in relation to the meeting in accordance with Section 78(3) of the Local Government Measure 2011.

(NB: Members are reminded that under Section 78 Members having been given a prohibited party whip cannot vote on a matter before the Committee.)

4.	CURRICULUM FOR WALES
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To receive a presentation on the Curriculum for Wales.

5.	SECONDARY SCHOOLS IMPROVEMENT STRATEGY - CONTINUATION
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To receive and consider the report on the Secondary Schools Improvement Strategy (continued from the September 13th meeting).

(Pages 5 - 12)

6.	WORK PROGRAMME
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To note that future meetings of the Committee are scheduled as follows:

(Pages 13 - 14)

7.	PROGRESS ON SCHOOL BALANCES AUTUMN 2023
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To receive and consider report on the Progress on School Balances Autumn 2023.

(Pages 15 - 22)

8.	EXEMPT ITEM
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To consider passing the following Resolution:

RESOLVE to exclude the public for the following item of business on the grounds that there would be disclosure to them of exempt information under category 3 of The Local Authorities (Access to Information) (Variation) (Wales) Order 2007).

The Monitoring Officer has determined that category 3 of the Access to Information Procedure Rules applies to the following item. His view on the public interest test (having taken account of the provisions of Rule 14.8 of the Council's Access to Information Rules) was that to make this information public would disclose information relating to the financial or business affairs of any particular person (including the authority holding that information).

These factors in his view outweigh the public interest in disclosing this information. Members are asked to consider these factors when determining the public interest test, which they must decide when considering excluding the public from this part of the meeting.

9.	SCHOOL BUDGETS REPORTS
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To receive an update from the Portfolio Holder and Officers on the Schools Budgets.

Committee Reflection

Following the close of the meeting the Committee is asked to spend 5 to 10 minutes reflecting on today's meeting.

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**Learning and Skills Scrutiny Committee
13th September 2023**

Report Title:	Secondary Schools Improvement Strategy
Lead Officer:	Cressy Murphy

Key Issues in the report highlighted by Lead Officer

Progress made in realising the aims of the Secondary School Improvement Strategy has been slow and now needs to gain in pace with the Secondary School Improvement Team working closely with schools in line with the Estyn visit improvement plan. This will include: Improving relationships with Headteachers, Improvements to Teaching and Learning and Improvements in the reporting systems.

Key Feeders (tick all that apply)

Strategic Risk		Cabinet Work Plan	
Director / Head of Service Key Issue		External / Internal Inspection	
Existing Commitment / Annual Report	X	Performance / Finance Issue	
Suggestion from Public		Referral from Council / Committee	
Corporate Improvement Plan		Impacting Public / other services	
Service Integrated Business Plan			
Suggestion from Members			
Partnerships			

Scrutiny Impact (tick all that apply)

Policy Review		Performance	
Informing Policy Development		Evidence Gathering	
Risk		Corporate Improvement Plan	
Service Integrated Business Plan		Partnerships	
Pre-Decision Scrutiny		Finance / Budget	

Other (please specify)

Suggested scrutiny activity - Committee's Role:

To be aware of the progress made in realising the Secondary School Improvement Strategy and to scrutinise the effectiveness of the team working with the secondary schools across Powys. To scrutinise how effectively the schools are responding to the challenge and support provided by the team.

On what specific elements of the report would scrutiny comment add value

CYNGOR SIR POWYS COUNTY COUNCIL.

Learning and Skills Scrutiny Committee

Date

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Report Author:	County Councillor Pete Roberts Portfolio Holder for a Learning Powys
Lead Officer:	Cressy Murphy
Report Title:	Secondary Schools Improvement Strategy
Report For:	Information and Discussion

1. Purpose

The purpose of the report is to provide the Learning and Skills Scrutiny Committee with an overview of the work undertaken by Schools Service and schools, in collaboration with key partners to support the implementation of the Secondary School Improvement Strategy

2. Background

2.1 The Secondary School Improvement Strategy (SSIS) was developed in February 2021 as a key stepping-stone to support the ambitious vision for Powys. An integral part of the SSIS, in line with Education in Wales: Our National Mission, is to encourage and promote collaboration between secondary schools to share good practice, innovate and improve in order to achieve the highest possible standards and move towards becoming a high achieving, self-improving LA.

2.2 The implementation of the SSIS will drive sustainable school improvement, guided by effective self-evaluation and improvement planning, and provide all school leaders with the necessary support to improve practice. This will eventually lead to a network of excellent schools, working within a collaborative environment, to spread excellence across the secondary sector. In addition, the emphasis placed on continuous school improvement, sharing and learning from good practice, at whole school and departmental level, in relation to learning and teaching, leadership and the curriculum and its implementation will address the seven dimensions for schools as learning organisations (SLO).

2.3 The SSIS noted that the focus in the short term would be

- ensuring consistency in the quality of self-evaluation and improvement planning
- improving learning and teaching
- improving literacy and numeracy standards across secondary schools
- implementing an agreed strategy to improve leadership development, professional learning and to develop school to school collaboration.

2.4 The implementation of the SSIS was hindered by the Covid-19 pandemic. The lockdowns and restrictions limited the amount of time that officers and consultants could visit schools and work alongside leaders and also changed the immediate focus of the school support required. The challenges faced by secondary schools during this time resulted in the majority of time and energy being focussed on managing the day-to-day challenges, detracting the focus from their long-term strategic aims. One positive impact that emerged as a result of the pandemic is the use of digital technology to access Professional Learning (PL) activities.

2.5 The decommissioning of ERW also stalled progress against the recommendations in the SSIS, and in addition, the dependency on external consultants in the design and delivery of professional learning events and in developing school-to-school collaborations had some effect on the implementation of the SSIS in that it has limited SIAs' capacity to ensure the necessary follow-up and evaluate the effect of these initiatives on school improvement.

- 2.6 Following the demise of ERW, and the significant challenge that the LA had faced in recruiting secondary Challenge Advisers and a Secondary School Improvement Manager a secondary school improvement team consisting of a Secondary School Improvement Manager (SSIM) and five subject specialist advisers were appointed and took up post in September 2022.
- 2.7 The need to establish new methods of working and develop a baseline of provision and standards in secondary schools led to an element of plateauing in the support and challenge provided in the initial stages of the team's work which was identified in the recent Estyn visit.
- 2.8 The initial focus of the team has been on establishing a strong understanding of the strengths and areas for development for individual schools, on developing leadership practice with a strong emphasis on the quality of self-evaluation and improvement planning and on developing literacy and numeracy skills of learners across Powys secondary schools.
- 2.9 This work has placed the team (and thus the LA) in a suitable position to evaluate progress against the SSIS priorities and further develop the support provided to ensure a bespoke and targeted approach to have a positive impact in schools. In addition, the SSIM (Secondary school improvement manager) has a clear picture of the changes required to further develop the work of the team, improve the support and challenge provided, ensure consistency across the team and develop the system to track the effect of the advisers' work.

3. Priority 1: Ensuring consistency in the quality of self-evaluation and improvement planning

- 3.1 The secondary team provided training, available to all Headteachers on the new school improvement guidance and development plan writing. All schools received feedback on their school development plans and were supported and challenged to improve them in line with the new guidance through 'Support and Challenge meetings'. As a result of this the majority of schools improved their development plans, with more focused priority areas informed by first hand evidence.
- 3.2 All schools have received support from school improvement advisers (SIAs) to develop their approaches to self-evaluation. By January 2023 schools had developed a calendar of appropriate activities based on gathering first hand evidence of learning which led to identification of broad areas of strength and areas to improve. There are however, too many cases where school leaders do not identify the specific features of learning that require development precisely enough, and not all schools triangulate the evidence between different monitoring activities well enough. There has been an over-reliance on the use of examination data to provide information on the progress that learners are making in lessons and over time, which is not in line with the principles of the Curriculum for Wales.
- 3.3 School improvement advisers and subject advisers have worked alongside school leaders to model effective approaches to learner centred self-evaluation processes. This has included doing joint lesson observation, learning walks, looking at work and listening to learners followed by professional dialogue about the findings. This work, alongside the work of the Support and Challenge meetings, has seen a number of schools make significant progress in their understanding of learner centred evaluation. This work is still in its initial stages, and therefore improving self-evaluation and improvement planning processes remains an important focus for the LA.

4. Priority 2: Improving teaching and learning

4.1 In January 2023 the secondary team worked closely with schools to evaluate standards of learning and teaching across Powys secondary and all-age schools. The findings from these visits have allowed the team to begin to develop suitable support for the schools. Strengths across Powys include that in nearly all cases there are positive relationships between learners and adults in schools. Learners listen carefully to input from teachers, and are courteous and polite to adults and their peers. Most teachers have strong subject knowledge, and many give clear explanations and support learners to build on their prior knowledge successfully. However, in too many cases teachers have low expectations of what the learners are capable of achieving, the pace of learning is too slow and teachers over direct the learning. As a result far too many learners in Powys do not make the progress over time that they are capable of. Improving teaching and learning experiences will continue to be a priority for the service.

4.2 The secondary team are developing links with the Curriculum for Wales (CfW) and PL Team to provide a variety of PL opportunities linked to learning and teaching and supporting clusters with the development of CfW through targeted, staggered INSET sessions to ensure all PCC officers can support each cluster and provide bespoke guidance. The feedback from the majority of clusters has been positive and they have found the CfW INSET PL sessions helpful in developing a shared understanding of progression in learning, which is a mandatory expectation for all schools and clusters.

4.3 In cases where schools have requested the support, the secondary subject advisers have worked closely with middle leaders and teachers in schools to build on the work undertaken in the Cluster INSETs and support practitioners to develop teaching practice in line with the twelve pedagogical principles of Curriculum for Wales. There has been positive feedback in response to the work of the subject advisers, with many Headteachers stating that the support was 'extremely useful'.

4.4 The OLEVI Outstanding Teacher Programme (OTP) has been offered to nearly all clusters of schools. Six secondary school clusters have taken part in the OTP, with at least one teacher from these schools attending the training. One of the secondary schools involved has stated that the OTP has had a significant impact on improving learning and teaching across the school. The impact of the OTP training on developing whole school approaches to pedagogy has been variable. Where it has been effective, schools have shared the pedagogy with all teaching staff and developed a whole school approach which underpins their understanding of pedagogy and has given staff the confidence to try new techniques. These staff have used the questioning techniques to draw out higher level responses from learners, especially impacting on the development of MAT learners. However, in a few schools, the OTP techniques have not been shared across the whole school and therefore it is not used consistently across classes and is having a limited impact on improving pedagogy.

4.5 Eight facilitators from across Powys have been trained as OLEVI trainers, and they facilitated their first OTP programme in autumn 2022. This programme will be developed into the new academic year and offered to all secondary and all-age schools. Training from the OLEVI trainers will be followed up by support from the school improvement advisers to ensure the approaches are embedded across the school and impact all practitioners.

5. Priority 3: improving literacy and numeracy standards across secondary schools

5.1 Following the return to school after the lockdowns, regression was seen in learners' key skills, resilience and social and emotional skills. The Education Endowment Foundation (EEF) 2022 report states that overall, "the evidence shows that Covid-related disruption has caused learning loss in both maths and reading, though there is some variability in different studies' findings on which subject has been more affected." Most evidence shows that by summer 2021, learners had not yet recovered from the learning they had lost during 2020 and 2021 in both maths and reading and in

fact a recent study (DfE, 2022) found that in secondary reading, learning losses have increased since the end of the 2021 summer term. The impact of the Covid-19 pandemic on Welsh medium literacy has also been captured and the July 2021 WG report evidences the significant impact upon the Welsh medium provision particularly the learners who lived in non-Welsh speaking households during the lockdowns.

Moving forward it is essential that practitioners focus on the identification of the gaps in learning and provide effective formative feedback to close the learning gap. It has been argued by some researchers that now is not the time for marks, levels, or grades but a greater focus in building confidence in our learners by focusing on the key skills which will act as a springboard to all learning.

5.3 In 2021-22 all secondary schools were given the opportunity to participate in the LA's "reading behaviours" programme with the expectation that this would improve reading standards across the ability spectrum and in individual subjects across all schools. Progress in relation to literacy and numeracy and in particular the impact of the reading behaviour programme was the subject of the LA's summer monitoring visits in 2022. The overall evaluation was that less progress had been made than expected. The following actions formed part of the overall recommendations:

- Literacy/numeracy development plans should include key, measurable targets for ensuring individual subject contributions to literacy/numeracy across the curriculum, and all schools should identify a leader(s) responsible for developing the provision for literacy and numeracy skills across the school.
- Ensuring that literacy/numeracy rich tasks are appropriate and sufficiently challenging to meet the needs of all learners and Curriculum for Wales expectations.
- Professional learning programme needed for staff to develop expertise in oracy (speaking and listening), embed reading behaviours as an essential part of classroom practice and establish techniques to improve learners writing across the curriculum.
- Professional learning programme for staff to develop expertise in developing numeracy across the curriculum.
- Establish suitable systems to evaluate literacy/numeracy standards across the school that include lesson observation, book scrutiny, learning walks, teacher and learner voice.
- Ensure that all practitioners in the school know and understand what good practice in literacy/numeracy across the curriculum looks like.

5.4 Training on the planning for the effective development of learners' numeracy skills has been delivered to all schools during 2022-23. All schools have engaged positively with the training and have worked with subject advisers to develop approaches to numeracy in individual subject areas. Most schools have now appointed dedicated 'numeracy coordinators' whose role it is to develop numeracy across the curriculum. From the evidence seen on school visits there has been strong progress in schools' approaches to the evaluation of numeracy, and improvements have been noted in planning for developing numeracy. Standardised numeracy methods have been agreed and shared with staff in many schools and the mapping of numeracy opportunities across the curriculum has begun in many schools. Many schools have focussed on improving learners' ability to synthesise and present information through the use of graphs, an area which has been highlighted by Estyn as in need of improvement across Wales. Schools have worked with subject advisers to develop the use of graphs in different subjects across the curriculum. Where requested officers have provided training and support in effective intervention strategies for improving numeracy skills, including through the medium of Welsh. One school that received the training has reported an increase in confidence and their fluency with number operations.

5.5 Schools are beginning to improve their provision for developing literacy across the curriculum based on the needs of their learners. Officers have enabled the sharing of good practice through network meetings and have shared strategies and exemplars, for example spelling and oracy strategies, explicit vocabulary instruction and Talk for Writing. A literacy audit tool has been shared with all schools, and schools have been supported to assess literacy provision and develop their literacy improvement plans. Subject advisers have built on this by working directly with schools to

demonstrate how these approaches can be used in practice. In addition to this the LA have brokered 'Voice 21 training' for all secondary and all-age schools. This is a comprehensive training and follow up programme to support schools to develop and implement outstanding provision for the development of oracy across the school. This training will begin in autumn 2023.

5.6 Research on the instruction of literacy with language is a comprehensive Welsh literacy intervention package focussed on reading in years 3 to 6 and endorsed by Welsh Government. All all-age schools have received training in this approach and will implement the interventions from September 2023. This work will improve the reading skills of learners in Welsh and English medium schools and across clusters so that they are able to progress their learning more rapidly in the secondary phase.

5.7 Literacy and numeracy networks have been established, and well attended by schools. These networks allow identified best practice in literacy and numeracy to be shared, and support collaborative working between as well as within schools. Training has been provided to new literacy and numeracy coordinators in understanding and being effective in their role, training has also been provided to newly qualified teachers and non-specialist teachers. Subject advisers have worked closely with schools to identify the precise areas of literacy and numeracy that they need to develop in each subject area and have supported them to develop subject specific approaches to literacy and numeracy through joint planning, modelling and professional learning opportunities. This has led to an increased understanding of what good practice in literacy and numeracy across the curriculum looks like.

6. Implementing an agreed strategy to improve leadership development, professional learning and to develop school to school collaboration

6.1 During the pandemic the LA and schools worked closely to begin a leadership development programme and increase school to school collaboration. This was well-received by schools however, the impact of these two programmes was affected by

- the pandemic and in particular its effect on the time and energy available for professional learning
- an overly full professional learning programme for Headteachers and senior leaders that did not allow sufficient time at school level to share and then implement some of the key messages presented in the sessions
- a minority of individual sessions were not directly linked to LA and school priorities
- the lack of a strategic approach when deciding on school-to-school collaborative groups
- LA and school improvement advisers not fully involved in the sessions and as a result were not in a position to follow up on the learning in schools

6.2 Since September 2022 SIAs have worked closely with school leaders in a coaching and mentoring capacity with a focus on a re-engaging with strategic thinking and planning in the aftermath of the Covid-19 pandemic. Examples include where school improvement advisers have supported leaders to realise a vision for improving teaching and learning experiences and embed that culture across the school, there has been leadership support for curriculum planning and development, and for effective line management and performance management. Feedback from headteachers and school leaders has been positive, with nearly all leaders describing the support they have received as 'extremely useful' or 'somewhat useful'.

6.3 Acting and newly appointed Headteachers have been assigned a mentor, and for those who have worked in Powys previously that mentor has been from out of county in order to bring an external perspective. This has been well received and one headteacher stated that the choice

of mentor being tailored to their needs has been extremely beneficial. Recruitment of strong school leaders in the secondary sector has also been improved and is already having a positive impact on standards and provision.

6.4 Schools have been signposted to the most appropriate national leadership development programmes by LA officers, including the national senior leadership development programme, the middle leadership development programme and the NPQH qualification. Attendance from secondary practitioners at these programmes has declined over the 2022-23 academic year, and this has largely been due to pressures in schools around staffing and cover and the level of commitment necessary to attend. Where leaders have attended these programmes there has been a positive impact on leadership practice, and all leaders attending have been able to demonstrate their impact on the school development plan.

7. Wellbeing

7.1 In addition to the above, secondary schools have reported an increased level of challenge in relation to promoting good levels attendance, behaviour and a positive and resilient attitude to learning. As these aspects have a direct impact on teaching and learning and on creating the conditions for individual learners and teachers to succeed then improving attendance, inclusion and attitudes to learning of secondary age learners has been added to the priorities for the SSIS.

7.2 All schools receive support from a dedicated Educational Welfare Officer (EWO) to work with them to develop approaches to improving attendance and relationships with learners and their families. Where the need for further support for wellbeing and attendance has been identified we have provided additional bespoke support through school improvement advisers. This support has resulted in an increase in attendance across the county, and attendance in Powys remains well above the Welsh national average.

8. Conclusions and next steps

8.1 The evaluation of the SSIS priorities has shown that progress was not in line with expectations during the academic year 2021-22. As referred to previously this can be largely attributed to the impact of the pandemic, including schools being focussed on day-to-day challenges which detracted from the focus on strategic planning. In addition, there have been recruitment challenges within the service.

8.2 Early in the academic year 2022-23 two schools received Estyn monitoring visits and as a result were placed into 'Special Measures'. In addition, one school received a core inspection and was placed into 'Estyn review'. This has placed additional pressure on the new team due to the need to provide intense support for those schools. Five secondary or all-age schools are due inspection in 2023-24.

8.3 Whilst progress was initially slow in 2022-23 due to the induction of a whole new team as has been identified by Estyn in their recent visit, the need to establish a baseline across the county, progress against the priorities has increased at a steady rate through the rest of the academic year. Improvements have been seen in self-evaluation and improvement planning, and in the planning for the development of learners' literacy and numeracy skills. In addition, the LA now have a good understanding of the strengths and areas for development of individual schools, and are able to tailor support to their specific needs. This is beginning to ensure that support is more focussed and precise, which leads to greater and more sustainable impact.

8.4 Support for the development of Welsh language in secondary schools is an area for development for the service. There is not currently a Welsh speaking officer in the secondary school improvement team due to challenges with recruitment. The SSIM has brokered Welsh medium support for schools through the MWEP, external consultants and by working closely with the primary improvement team however, going forward the need for a dedicated Welsh speaking school improvement adviser should be considered.

8.5 As a result of the findings in this report the SSIS has been revised and updated. The short-term priorities for the revised SSIS are listed below:

1. Improving the quality of learning and teaching experiences across Powys secondary and all-age schools.
2. Improving self-evaluation and improvement planning processes in secondary and all-age schools.
3. Improving standards in literacy and numeracy for learners in secondary and all-age schools.
4. Improving attendance, inclusion and attitudes to learning of secondary age learners.
5. Implementing an agreed strategy to strengthen leadership at all levels and develop school-to-school collaboration.

8.6 Priority 1 improving the quality of learning and teaching experiences will always be the main focus of the service, and the following four priorities will all build towards and support the realisation of priority 1.

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Corporate Director:	Lynette Lovell

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Learning and Skills Scrutiny Committee Forward Work Programme Nov 23 – Mar 24

2023

16/11 11am	PRE-MEET	
17/11 14.00 – 16.30	Committee - Public Curriculum for Wales (max 1/2hr) Secondary Schools Improvement Strategy Covering Report - Public Confidential Finance - School Budgets	Chris Davies Cressy Murphy Mari Thomas / Jane Thomas/ Nancy Owen
11/12/23 2pm	PRE-MEET	
13-12-23 14.00 – 16.30	Committee - Public WESP Update Estyn Updates – (incl. Schools causing concern) Q2 Strategic Risk Register Closed Session?	Bethan Price Lynette Lovell / Georgie Bevan Bets Ingram

2024

Date and Time	Type and Detail	
Jan 15 th 2pm	Informal committee session - Schools Funding Formula Review	Mari Thomas / Nancy Owen
Jan 17 th 2pm (1)	Committee – Public Progression and Learning (Incl. LA level verified exam data) (max 1hr)	
Jan	Pre-Meeting	
Jan 30 th 10am	Committee - Public Budget Scrutiny	
Feb	Pre-Meeting (if required)	
Feb 9 th 2pm (2)	Committee - Public Performance and Risk Q3 (between 13/02 & prior to cabinet 27/02) Alternative Budget (if required)	James Langridge - Thomas

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CYNGOR SIR POWYS COUNTY COUNCIL.**LEARNING AND SKILLS SCRUTINY COMMITTEE****Date 17th November 2023****REPORT AUTHOR: County Councillor Pete Roberts
Cabinet Member for a Learning Powys****County Councillor David Thomas
Cabinet Member for Finance and Corporate
Transformation****REPORT TITLE: Progress on School Balances Autumn 2023**

REPORT FOR: Discussion / Information

1. Purpose

1.1 To provide an update on the financial position of those schools that submitted unlicensed budget plans in May 2023 and those schools that were asked to produce recovery/spending plans in light of their projected financial positions.

2. Background

2.1 The Scheme for Financing Schools sets out the Council's expectations and potential actions should a school present a budget showing deficit balances arising in relation to a school's budget share.

2.2 The Scheme also sets out expectations for those schools holding surpluses in the excess of the regulations. £50k for Primary and £100k for all other sectors.

2.3 Schools' financial management has been an ongoing concern for some time and was highlighted by Estyn in 2019. It is an area where the authority has supported improvement, working with governors, headteachers and business / finance managers. There have been some significant developments, but there is further work to do and the current financial climate is challenging for all. Early engagement with schools on the scale of the budget challenge last Autumn helped ensure constructive budget discussions, while setting the expectation that schools, like the Council, were expected to do all that they can to manage their budgets within the resources available to them. This work will be ongoing as the public finance environment continues to be extremely challenging.

2.4 12 Warning notices were issued in July 2019 to schools that submitted budgets with escalating deficits that did not comply with Powys County Council's Scheme for Financing Schools, bringing the total number of active

warning notices at 1 April 2020 to 13. As at 1 April 2023 this number has reduced to 5.

3. Unlicensed Schools/Deficit recovery plans requested

3.1 26¹ schools submitted budget plans in May 2023 (15 Primary schools, 8 Secondary, 2 All age and 1 Special school), that were either in an unlicensed position (16) or licensed/approved position for 2023-24 but future years were forecasting a deficit (10). 18 of these schools were requested to submit recovery plans by 30 September 2023. 4 Schools received extensions to these deadlines, 2 of which have in-depth reviews planned for November. In addition the authority is working with 3 schools to put deficit agreements in place. The remaining 5 schools were not required to take any further specific action at that time but were expected to continue to work with the Authority to manage their budget positions.

3.2 Table 1 and 2 below summarises the original (May 23) and updated positions (September 23) by sector of the 26 schools referred to above.

Table 1: Summary position of the 26 schools following May 2023 budget plan submittals

Sector	Cumulative Projected Surplus/(Deficit) at 31 March 2024	Cumulative Projected Surplus/(Deficit) at 31 March 2025	Cumulative Projected Surplus/(Deficit) at 31 March 2026	Cumulative Projected Surplus/(Deficit) at 31 March 2027
Primary	(148,560)	(614,494)	(914,963)	
Secondary	(3,199,046)	(4,367,299)	(5,736,402)	(7,469,813)
All Age	48,160	(446,914)	(1,088,978)	(1,828,720)
Special	(124,239)	105,324	369,087	
Total	(3,423,684)	(5,323,382)	(7,371,255)	(9,298,533)

Table 2: Summary position of the 26 schools following September 2023 recovery plans submittals

Sector	Cumulative Projected Surplus/(Deficit) at 31 March 2024	Cumulative Projected Surplus/(Deficit) at 31 March 2025	Cumulative Projected Surplus/(Deficit) at 31 March 2026	Cumulative Projected Surplus/(Deficit) at 31 March 2027
Primary	(11,798)	(289,763)	(316,508)	
Secondary	(3,643,533)	(4,568,165)	(5,799,702)	(6,530,347)
All Age	66,102	(289,906)	(636,492)	(1,403,182)
Special	22,973	(12,883)	(60,961)	
Total	(3,566,255)	(5,160,717)	(6,813,662)	(7,933,529)

¹ Any closed schools have been removed

3.3 It should be noted that 2 schools are included within the tables with their most recent projected balances as they have been given extensions to the initial recovery plan deadline, subject to collaborating with the Authority in an in-depth review. Both in-depth reviews will take place in November 2023.

3.4 Progress is evident in the tables above for the Primary Sector from the 2023/24 financial year onwards. With a forecast improvement of £598k by the 31st March 2026. Of the 15 Primary schools, 10 would now be in an approved/licensed position, 1 with a deficit agreement in place, further 3 require deficit agreements and 1 where further work needs to take place with the school. This is the same for the All-age sector with a forecast improvement of £426k by 31st March 2027. This is the sector where the in-depth reviews will take place in November 2023. This will assist schools with their recovery plan submittal extension.

3.5 In respect of the Secondary sector, improvement in balances is not evident until 31st March 2027. In some instances the level of deficit has not been addressed early enough and the action now needed may be too severe to be viable immediately. There are schools with in-year surpluses prior to 2026/27 and schools that have submitted plans that balance in-year by 2026/27. Further requests for recovery plans have been made to schools who are projecting cumulative surpluses up to 2024/25, but projecting deficits thereafter. There is a forecast improvement of £939k by 31st March 2027. This will need to improve further, with schools needing to achieve in-year balanced positions in the first instance, and a review of the cumulative deficit held and payback thereafter.

3.6 Overall Special school balances are deteriorating, however 2023/24 remains in an approved position. Individual schools are to be requested to submit a recovery plan by January 2024 with the target of ensuring that future years are balanced.

3.7 In depth reviews have been carried out by officers in conjunction with 4 of the secondary schools to support them with identifying potential areas they could review in order to produce cost savings. Schools have been able to use the findings of these reviews in the production of their recovery plans.

3.8 Deficit agreements are also being used across the sectors where suitable, this provides greater clarity and stability for schools in managing their deficits. In each case the deficit agreement sets out the maximum deficit and the expectations of the school in managing that deficit over time.

3.9 A collaborative approach involving the Governing Body, Senior Leadership and Business / Finance managers at each of the schools with Schools Service, School Improvement Advisers, HR and Finance officers is crucial to making sustainable improvements to budget positions and financial management. Early planning and action by schools is key in preventing existing deficits escalating or to prevent schools falling into a deficit position at

all. Constant monitoring, planning and reviewing budgets is needed more than ever in the challenging financial environment we are all currently in.

4 Schools required to submit spending plans

4.1 6 schools had significant surpluses compared to their budget shares when they submitted the ratified budgets in May 2023 and were required to submit a spend plan by 30th September 2023.

4.2 Table 3 sets out the projected balances prior to spending plans being received.

Table 3 Projected balances prior to requested spending plan

Sector	Cumulative Projected Surplus/(Deficit) at 31 March 2024	Cumulative Projected Surplus/(Deficit) at 31 March 2025	Cumulative Projected Surplus/(Deficit) at 31 March 2026
Primary	716,599	717,342	846,836
Total	716,599	717,342	846,836

Table 4 Balances after spending plans received

Sector	Cumulative Projected Surplus/(Deficit) at 31 March 2024	Cumulative Projected Surplus/(Deficit) at 31 March 2025	Cumulative Projected Surplus/(Deficit) at 31 March 2026
Primary	495,388	296,582	244,229
Total	495,388	296,582	244,229

4.3 Overall, balances have improved. There was 1 school that did not meet the deadline and has been asked to submit by the end of November.

5 Overall School Budget Forecasts

5.1 Overall, the schools' forecast positions at the end of September 2023 are set out in the table below with future years shown in Appendix A:

	Primary	Secondary	All-Age	Special	Total
Budgets submitted 30th September 23					
Number of schools projecting a surplus 23-24	62	2	2	3	69
Projected Value of Surplus (£)	3,282,976	577,438	426,805	586,087	4,873,306
Number of schools in Deficit	13	6	1	0	20
Projected Value of Deficit (£)	-512,178	-4,236,887	-31,787	0	-4,780,852
Overall – Number	75	8	3	3	89
Overall – Value (£)	2,770,798	-3,659,449	395,018	586,087	92,454

2

5.2 Where schools' projected balances have fallen from approved or licensed positions into unlicensed positions, they have been asked to submit recovery plans. To date this year, 1 notice of concern has been issued and further recovery plan requests will be made in line with the Scheme for Financing Schools for any schools projecting a cumulative deficit balance for 2025/26.

5.3 In respect of Secondary school projected reserves as at 31st March 2024, 2 schools make up the majority of the deficit within this sector, together totalling £3.4 million. The table below set out the historical deficits for those 2 schools dating back 5 years

Cumulative Surplus/(Deficit) at 31 March 2019	Cumulative Surplus/(Deficit) at 31 March 2020	Cumulative Surplus/(Deficit) at 31 March 2021	Cumulative Surplus/(Deficit) at 31 March 2022	Cumulative Surplus/(Deficit) at 31 March 2023
(1,120,121)	(1,749,980)	(1,824,276)	(1,825,011)	(2,598,946)

5.4 Finance, School Improvement and HR advisers are supporting schools to develop appropriate recovery plans in line with suggested savings and there have been improvements seen since last month following financial surgeries, where discussions are held to ensure accuracy of current budget plans and costing of options by the Finance team (through Service Level agreement with Primary Sector only) and discussions around timing of savings. Finance officers have also identified potential training needs as part of the reviews and surgeries.

5.5 Key financial messages and training opportunities have been shared with headteachers through the Area Heads Meetings these include targeting training where required in respect of accessing financial systems, reporting, accuracy of budget plans and support to schools where business manager vacancies exist and striving for right first time in respect of financial coding. We continue to use the benchmarking tool and finance toolkit to direct discussions during finance surgeries to identify further potential savings.

² This table shows the position submitted by schools as at September 2023, not all recovery plan submittal figures were included at this point due to the timing of submittals, but they are included in Table 2 where applicable.

5.6 The tables in Appendix A show the number of deficits rising from 2023/24 by 10 and then a further 3 by 2025/26. Deficits in the majority are within the Secondary, All-age and Special school sector.

5.7 In respect of the impact of finance surgeries and support to schools Secondary cumulative deficits in 2025/26 are showing 1 Secondary school is projecting an in-year balance, this increases by a further 3 in 2026/27. Further, more are expected once recovery plans are submitted based on cumulative deficit projections for 2025/26. This is prior to further action being taken by Schools.

6 Other developments

6.1 Improvements have also been made in respect of reporting school balances to the Head of Education on a monthly basis. There is now a specific report focusing on delegated budgets, allowing officers to discuss any developments over the previous month in more detail. This allows for the prompt escalation of any concerns regarding school balances or financial management. Concerns are discussed and actions agreed on an ongoing basis. This has resulted in more timely communication with schools, setting out the expectations of them in terms of managing their budget positions and, if needed, actions for them to undertake. This approach is more agile and is more effective in providing the support needed or, where necessary, putting spending restrictions in place, reducing the risk or scale of escalating deficit positions.

7 Conclusion

7.1 Cumulative deficit balances remain a concern, but schools are working well with Council officers to bring in-year budgets into balance and halt the growth of cumulative deficits. Once this position is achieved and consolidated, work begins on reducing the deficit where possible whilst also having due regard to the learner entitlement for the learners at the school currently.

7.2 The challenging public sector financial environment will continue to impact on schools' projected balances and Council officers will continue work with schools on an individual basis to support them in managing their budget position whilst maintaining delivery of education to Powys learners.

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All school balances Future years 2024-25 and 2025-26³

	Primary	Secondary	All-Age	Special	Total
Budgets cumulative estimates March 2025					
Number of schools projecting a surplus 24-25	55	2	1	2	60
Projected Value of Surplus (£)	2,334,335	191,813	161,825	302,781	2,990,754
Number of schools in Deficit	18	6	2	1	27
Projected Value of Deficit (£)	-622,043	-4,941,876	-289,906	-12,883	-5,866,708
Overall – Number	73	8	3	3	87
Overall – Value (£)	1,712,292	-4,750,063	-128,081	289,898	-2,875,954
Budgets cumulative estimates March 2026					
Number of schools projecting a surplus 25-26	52	1	0	1	54
Projected Value of Surplus (£)	1,865,902	41,333	0	107,719	2,014,954
Number of schools in Deficit	18	7	3	2	30
Projected Value of Deficit (£)	-919,593	-6,397,247	-686,960	-215,008	-8,218,808
Overall – Number	70	8	3	3	84
Overall – Value (£)	946,309	-6,355,914	-686,960	-107,289	-6,203,854

³ Tables excludes New Brecon Primary School

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